

Step VII: Evaluate and Revise the Plan

When the organization has completed the development of its workforce plan, it is time to initiate the final step in the Vermont Seven Step Workforce Planning Model: Evaluate and Revise the Plan. This will be an opportunity both to:

- Assess how effective the planning process itself was; and
- Establish the means by which the organization will assess the results the workforce plan will achieve over time.

This type of evaluation is “**process evaluation**.” Process evaluation measures the implementation of an intervention (in this case, workforce planning). For example, it may assess the extent to which the components and activities were actually implemented; the qualities of the implementation; the number of people who participated; the feedback provided by those participants; etc. *See the document, “Workforce Planning Evaluation Questionnaire” (right-hand box on this page) for a complete list of items to be evaluated for workforce planning.*

Why Evaluate and Revise the Plan?

Workforce planning involves detailed data and forecasting. Both areas are prone to change, error, and interpretation. These qualities make evaluation an essential and non-optional component of workforce planning. Without it, it is very possible to continue using methodologies that provided wrong or ineffective results. It is possible to base long-range plans on assumptions drawn from momentary “snapshots” -- circumstances that are in rapid flux and may no longer apply.

It is therefore important not only that evaluation be built into the planning process, but that it be continuous and ongoing -- not a “one-shot deal.”

People are sometimes concerned that engaging in evaluation will bring negative results: “We don’t have time to evaluate. We’re pressed enough just trying to implement the workforce plan as it is!” Or, “Evaluation is what they use at the top of the organization to justify eliminating valuable programs without asking us for input, or without looking for ways to improve rather than to throw the baby out with the bathwater.”

These fears can be addressed in the evaluation process. When evaluation is built into a process or intervention, it can provide clear benefits, including:

- Identifying what is going well (productive, effective, positive, beneficial, efficient, successful, etc.);
- Identifying areas for improvement, some of which may improve time and resource efficiency and ease some of the pressure on staff;
- Obtaining input regarding possible approaches to correction or improvement;
- Providing documentation of effectiveness, thereby supporting valuable programs;
- Knowing when you have completed a phase, and it is time to move to the next phase; and
- Knowing when and if you have reached your goal.

Who Performs the Evaluation?

As with any assessment process, it is vital to obtain diverse input from outside the group that performed the work. Engaging participants from all levels of the organization will result in greater understanding of and investment in the process. It will also provide insight not possible from those closest to the planning effort. So, develop a multi-level, cross-organizational team, similar to the one developed for the workforce planning process.

How Do We Perform Workforce Planning Evaluation?

Following are important steps involved in completing an effective evaluation of the workforce planning process:

1. Form a team that has knowledge (or access to knowledge) of the workforce planning process.
2. Define a clear aim or goal for the evaluation process.
3. Understand the needs of the people who are served by the process and its outcomes.
4. Identify and define measures of success by reviewing the original intention/desired outcomes of the workforce planning process.
5. Brainstorm potential change strategies for producing improvement in the workforce planning processes.
6. Plan, collect, and use data for facilitating effective decision making.
7. Apply a scientific method to test and refine changes, in short cycles, to make sure the process is working.
8. It is important that people at all levels of the organization feel an ability to contribute to the process and to the evaluation and improvement of the process.

This description can be found in its entirety both on the Workforce Planning Toolkit Evaluation webpage and in PDF form in the right-hand “Forms and Documents” box.